



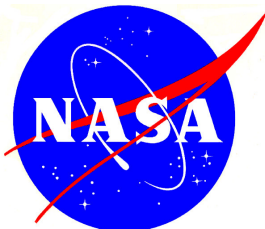
Integrated Financial Management Program

Core Financial

Course Name: Purchasing

*Module 4: Request for
Quotation/Quotation*

Data Packet



National Aeronautics and
Space Administration

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TOPIC 1: Generate Solicitation

ACTIVITY 1: Assign Buyer

The Procurement Team Lead received a purchase requisition for \$1.2M to purchase quality control, test and inspection services, and testing equipment. Assign a buyer to develop an RFO for this purchase.

Note: In order to complete all of the exercises, please refer to the following job aids within the OLQR in addition to the user procedures listed at the bottom of each activity: Transaction Codes-Request for Quotation/Quotation, Document Types – RFQ, PO & Outline Agreement, How to Request a New Vendor, Purchasing Document Drilldown, Product Service Classification (PSC) – Material Group, and Vendor Account Group.

FIELD	DATA
Transaction Code	ME52N
PR number	See Supplemental Data Sheet
<i>Change Purchase Requisition 42XXXXXXXXX</i>	
<i>Item Overview Section</i>	
Purchase group (buyer code)	See Supplemental Data Sheet

NOTE: To complete activity, refer to the Assign Buyer user procedure within the OLQR.

TOPIC 1: Generate Solicitation

ACTIVITY 2: Perform Market Research and Review Estimated Value

The Buyer is assigned a purchase requisition for \$1.2M to purchase quality control, test and inspection services, and testing equipment. A statement of work is attached to the PR. The assigned buyer reviews the PR including the estimated value and any market research results performed by the requisitioner. The Buyer performs additional market research by querying SAP and reviewing past procurements for the same or similar items and services to determine potential sources of supply. Review the estimated value for this PR to assist in determining which type of solicitation to prepare.

2a. Perform Market Research - *Purchasing Documents per Vendor*

FIELD	DATA
Transaction Code	ME2L
Purchasing Organization	See Supplemental Data Sheet
Scope of list (default value)	BEST (Purchase Orders)
Material group	59

2b. Perform Market Research – *Purchasing Documents per Material Group*

FIELD	DATA
Transaction Code	ZMM_PUR_DOCSTAT
Material group	59
Purchasing Organization	See Supplemental Data Sheet
Plant (required entry)	See Supplemental Data Sheet

2c. Review Estimated Value – *Display Purchase Requisition*

FIELD	DATA
Transaction Code	ME53N
PR number	See Supplemental Data Sheet

NOTE: To complete activity, refer to the Perform Market Research and Evaluate Acquisition Alternative and Verify PR Value and Funding user procedures within the OLQR.

TOPIC 1: Generate Solicitation

ACTIVITY 3: Generate Solicitation Document

After reviewing the PR, completing the market research, and synopsisizing the requirement for the quality control, test and inspection services, and testing equipment, the Buyer prepares the solicitation.

FIELD	DATA
Transaction Code	ME41
<i>Create RFQ: Initial Screen</i>	
RFQ type	ZP
RFQ date	TBD by Instructor
Quotation deadline	TBD by Instructor
Purchasing organization	See Supplemental Data Sheet
Purchasing group	See Supplemental Data Sheet
Item category	Z
Delivery date	TBD by Instructor
Reference to PReq	See Supplemental Data Sheet
<i>Create RFQ: Header Data</i>	
<i>Administrative fields tab</i>	
Collective number	See Supplemental Data Sheet
Validity Start Date	TBD by Instructor
Validity End Date	TBD by Instructor
Binding period	Quotation Deadline + 60 days
<i>Terms of delivery and payment tab</i>	
Currency	USD
Incoterms	FOB Destination
Target value	\$1,200,000
<i>Create RFQ: Vendor Address</i>	
Vendor	108480 (Generic Solicitation Vendor)
<i>Upon Save, Record Your RFQ #</i>	

NOTE: To complete activity, refer to the Generate Solicitation Document user procedure within the OLQR.

TOPIC 1: Generate Solicitation

ACTIVITY 4: Communicate Solicitation

The solicitation for quality control, test and inspection services, and testing equipment has been completed and is ready to be communicated either by printing, faxing, or saving as a PDF file for emailing, or for uploading to the web. For our exercise, you will need to simulate printing the document.

FIELD	DATA
Transaction Code	ME42
RFQ number	(Refer to RFQ number recorded on p. 5)
<i>Change RFQ: Item Overview</i>	
Output Type	ZOT3
Medium	Print output
Logical Destination	Local Windows Default Printer

NOTE: To complete activity, refer to the Distribute Solicitation & Contractual Documents user procedure within the OLQR.

TOPIC 2: Amend and Cancel Solicitation

ACTIVITY 1: Amend Solicitation

A solicitation was issued for quality control, test and inspection services, and testing equipment, however questions arose that necessitate a clarification in requirements and an extension to the due date for receipt of offers. An amendment is created addressing these topics.

FIELD	DATA
Transaction Code	ME42
RFQ number	(Refer to RFQ number recorded on p. 5)
<i>Change RFQ: Item Overview</i>	
Quotation deadline	Extend by Two Weeks
Create Attachment	(Q & A document – desktop folder)
<i>Change RFQ: Header Data</i>	
Amendment number	0001

NOTE: To complete activity, refer to the Amend Solicitation user procedure within the OLQR.

TOPIC 2: Amend and Cancel Solicitation

ACTIVITY 2: Communicate Solicitation Amendment

Communicate the solicitation amendment for quality control, test and inspection services, and testing equipment. During this exercise, you will need to simulate the printing of the document.

FIELD	DATA
Transaction Code	ME42
RFQ number	(Refer to RFQ number recorded on p. 5)
<i>Change RFQ: Item Overview</i>	
Output Type	ZOTX
Medium	Print output
Logical Destination	Local Windows Default Printer

NOTE: To complete activity, refer to the Distribute Solicitation & Contractual Documents user procedure within the OLQR.

TOPIC 2: Amend and Cancel Solicitation

ACTIVITY 3: Cancel Solicitation Amendment

An amendment to the solicitation was created to extend the due date for receipt of offers. However, during the amendment approval process it was determined that sufficient time was allowed for offer preparation and that no extension should be granted. Therefore, the amendment was cancelled prior to issuance for the purchase of the research and development services and chimpanzees.

FIELD	DATA
Transaction Code	ME42
RFQ number	See Supplemental Data Sheet
<i>Change RFQ: Item Overview</i>	
Quotation deadline (amended field)	TBD by Instructor
<i>Change RFQ: Header Data</i>	
Amendment Number	0000

NOTE: To complete activity, refer to the Cancel Draft Request for Proposal (DRFP)/Solicitation Amendment user procedure within the OLQR.

TOPIC 2: Amend and Cancel Solicitation

ACTIVITY 4: Cancel Solicitation

A solicitation to purchase research and development services and chimpanzees has been approved and communicated. However, issues have arisen that cannot be resolved. Therefore, the solicitation must be cancelled.

FIELD	DATA
Transaction Code	ME42
RFQ number	See Supplemental Data Sheet
<i>Change RFQ: Header Data</i>	
Amendment Number	0001

Note: Cancel all line items.

NOTE: To complete activity, refer to the Cancel Draft Request for Proposal (DRFP)/Solicitation Amendment user procedure within the OLQR.

TOPIC 3: Evaluate Offers

ACTIVITY 1: Receive Proposals

Offers were received in response to the solicitation for quality control, test and inspection services, and testing equipment. The offers are entered into SAP and evaluated.

1a. Create New RFQ's

FIELD	DATA
Transaction Code	ME41
<i>Create RFQ: Initial Screen</i>	
RFQ type	ZP
RFQ date	TBD by Instructor
Quotation deadline	TBD by Instructor
Purchasing organization	See Supplemental Data Sheet
Purchasing group	See Supplemental Data Sheet
Item category	Z
<i>Create RFQ: Vendor Address</i>	
Vendor number	100204
<i>RFQ # for Analytical Services</i>	
Vendor number	If MSFC, enter: 100963 If GRC, enter: 100051
<i>RFQ # for Creative Management Tech</i>	

1b. Maintain Quote - Vendor 100204 – Analytical Services

FIELD	DATA
Transaction Code	ME47
RFQ #	See RFQ # for <i>Analytical Services</i>
<i>Maintain Quotation: Item Overview</i>	
Net Price (Test Equipment)	\$250,000
<i>Service Specifications: Quotation Specs for Item</i>	
Overall Limit	\$1,050,000
Expected Value	\$1,050,000
<i>Maintain Quotation: Header Details</i>	

<i>Terms of delivery and payment tab</i>	
Target Value	\$1,300,000

1c. Maintain Quote - Vendor 100963 – Creative Management Tech.

FIELD	DATA
Transaction Code	ME47
RFQ #	See RFQ # for <i>Analytical Services</i>
<i>Maintain Quotation: Item Overview</i>	
Net Price (Test Equipment)	\$180,000
<i>Service Specifications: Quotation Specs for Item</i>	
Overall Limit	\$1,200,000
Expected Value	\$1,200,000
<i>Maintain Quotation: Header Details</i>	
<i>Terms of delivery and payment tab</i>	
Target Value	\$1,380,000

NOTE: To complete activity, refer to the Maintain Quotes user procedure within the OLQR.

TOPIC 3: Evaluate Offers

ACTIVITY 2: Perform Evaluation

Offers were received for the solicitation for \$1.2M of quality control, test, and inspection services and testing equipment and software. Perform an evaluation (i.e., price comparison) of the proposals.

FIELD	DATA
Transaction Code	ME49
Collective number	See Supplemental Data Sheet

NOTE: To complete activity, refer to the Perform Evaluation user procedure within the OLQR.